# Quick Indexer

## Advanced User Manual

Version 3.9 SP1

**iDatix Corporation**

15201 Roosevelt Blvd., Suite 104, Clearwater, FL  33760

Tel:  (727) 441-8228 – Fax: (727) 444-4419

Email:  support@idatix.com

Web:  www.idatix.com

Copyright © 2000 – 2009, iDatix Corporation, All rights reserved.

All rights reserved. No part of the contents of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language in any form without written consent from iDatix Corporation.

This software product, including the manual and media, is copyrighted and contains proprietary information that is subject to change without notice. The software may be used or copied only in accordance with the terms of the license agreement.

Some screen images may not reflect the current iSynergy user interface, but the functionality information provided is an accurate reflection for the currently released iSynergy product.

iDatix, iSynergy, and Progression are registered trademarks of iDatix Corporation. All other trademarks are acknowledged as the exclusive property of their respective owners.

Version 3.9 SP1 --- 5.20.2009

# Table of Contents


Welcome to Quick Indexer 3.9 SP1 ..... 4
System Requirements ..... 4
Hardware Requirements ..... 4
Installing Quick Indexer ..... 4
Quick Indexer Login ..... 8
Quick Indexer Product Overview ..... 11
The Main Menu ..... 11
The Toolbar ..... 15
Application Selector ..... 18
Data Entry Pane ..... 19
iSynergy Submission ..... 20
Document Browser ..... 20
Document Viewer ..... 21
Status Bar ..... 21
Using Quick Indexer ..... 22
Loading a File in Quick Indexer ..... 22

# Welcome to Quick Indexer 3.9 SP1

Quick Indexer is an electronic file processing application that archives digital media and files in iSynergy. Similar to a virtual gateway, Quick Indexer allows users to submit any type of digital file to iSynergy. With each submission, users can define index values to prepare the files to be searchable.

### *Quick Indexer is Flexible.*

Quick Indexer gives you the flexibility to make additions into iSynergy and streamline your workflow by allowing users to define and submit index values by simply dragging a file onto the Quick Indexer desktop icon.

### *Quick Indexer is Efficient.*

Quick Indexer increases the speed at which electronic files can be used in the system. Dramatically improving the rate of processing while also ensuring data accuracy, Quick Indexer effectively increases productivity across a small business, office or department.

### *Quick Indexer is Adaptable.*

As business requirements and demands change, it is important that your software solutions are also able to adapt. Quick Indexer gives you the flexibility to store any electronic file information within the iSynergy data repository, and it gives you the flexibility you need to respond to the ever-changing business climate.

### *Purpose*

The purpose of this Quick Indexer Advanced User Manual to provide descriptions and instructions for the installation, configuration and customization of Quick Indexer.

### *Assumptions*

This guide assumes you are familiar with iSynergy and Microsoft Windows 2003.

# System Requirements

## Hardware Requirements

The following table lists the minimum and recommended hardware requirements for Quick Indexer.

| Component | Minimum | Recommended |
|---|---|---|
| Processor | Pentium II, 500 MHz (or equivalent) | Pentium 3, 800 MHz (or equivalent) |

| Component | Minimum | Recommended |
|---|---|---|
| Memory | 512 MB | 1 GB |
| Hard Drive Space Requirement | 30 MB | |

# Software Requirements

The following bullets list the minimum software requirements for Quick Indexer.

- Windows XP Professional

  *Note: Can also be installed in Windows 2003 Operating System*

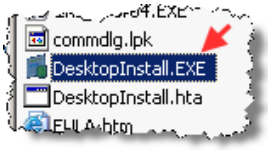
- iSynergy 3.9 SP1
- ODBC.NET
- .NET 2.0 Framework SP1

# Installing Quick Indexer

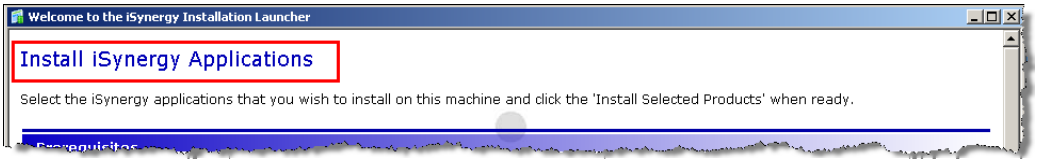
Prior to initiating the Quick Indexer installation, be sure to install all of the prerequisites.

*Note: Please refer to the iSynergy 3.9 SP1 Advanced User Manual for information regarding the prerequisites. Additionally, you may choose to install Quick Indexer using either the MSI file or the HTA, this document will only cover using the HTA.*

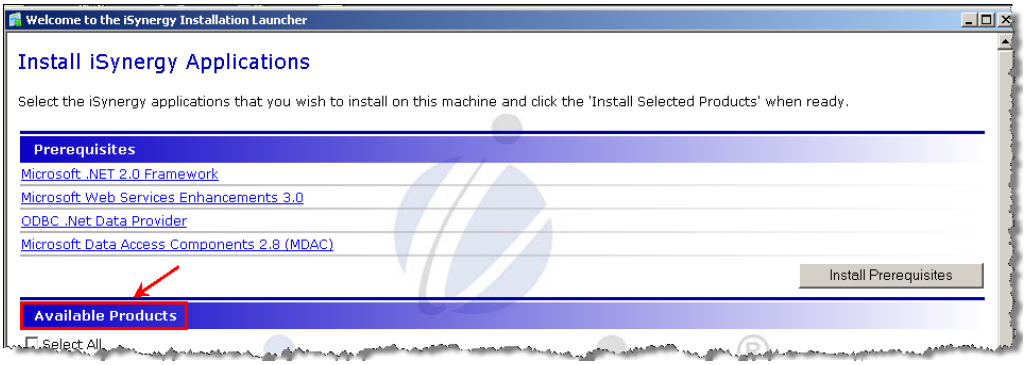
1. Navigate to and select **DesktopInstall.exe**.



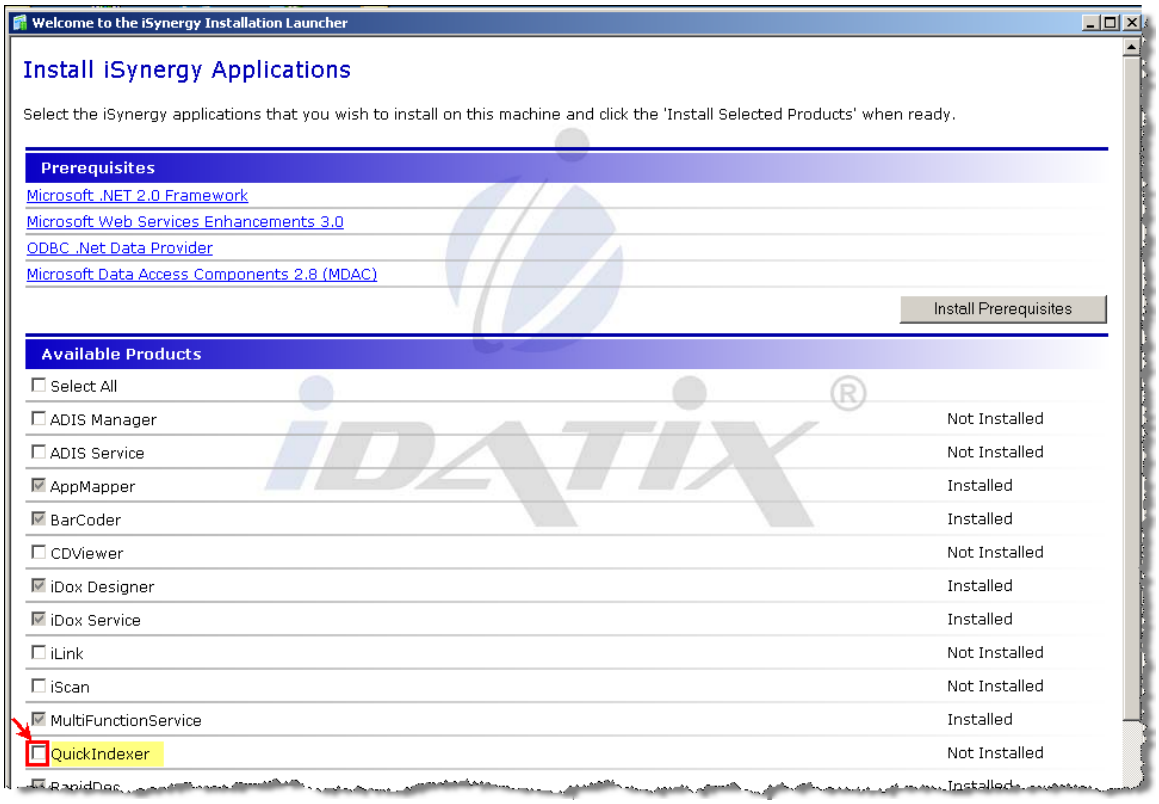

*Note: The Install iSynergy Application HTA displays.*


Welcome to the iSynergy Installation Launcher
Install iSynergy Applications
Select the iSynergy applications that you wish to install on this machine and click the 'Install Selected Products' when ready.

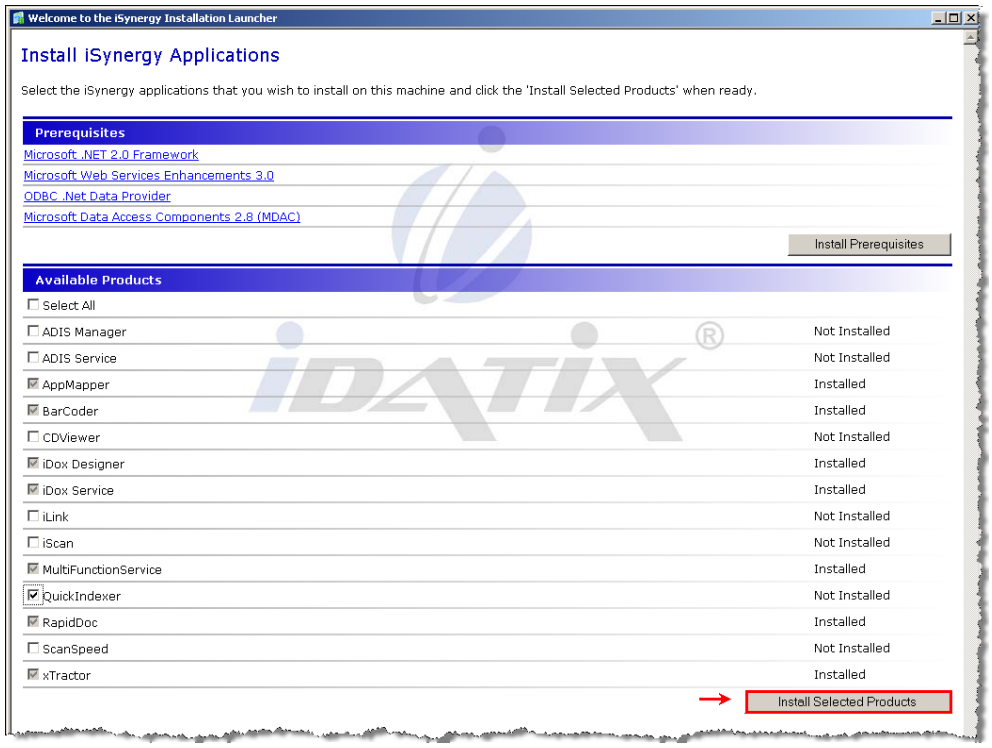
2. Navigate to **Available Products**.


Welcome to the iSynergy Installation Launcher
Install iSynergy Applications
Select the iSynergy applications that you wish to install on this machine and click the 'Install Selected Products' when ready.
Prerequisites
Microsoft .NET 2.0 Framework
Microsoft Web Services Enhancements 3.0
ODBC .Net Data Provider
Microsoft Data Access Components 2.8 (MDAC)
Install Prerequisites
Available Products
Select All

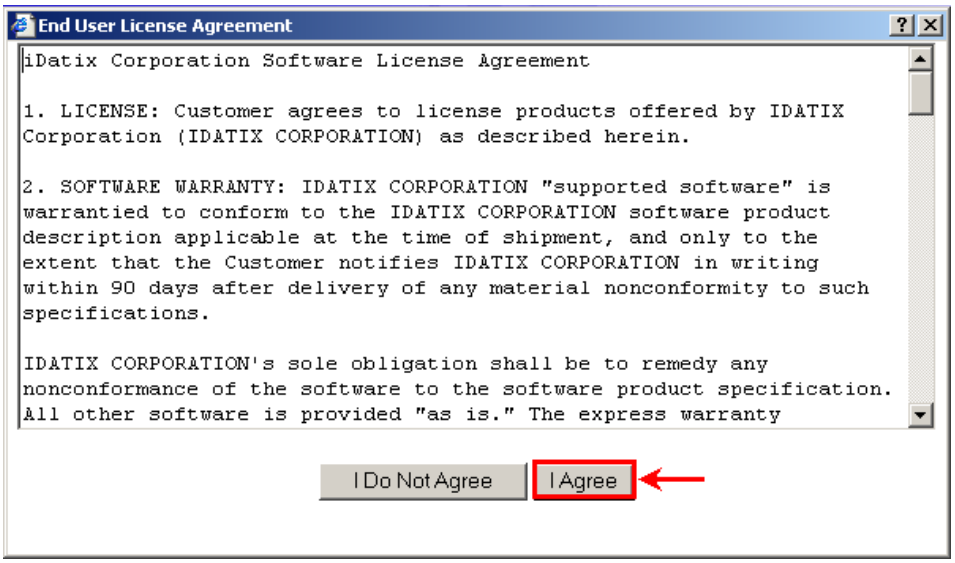
3. Select **QuickIndexer**.


Welcome to the iSynergy Installation Launcher
Install iSynergy Applications
Select the iSynergy applications that you wish to install on this machine and click the 'Install Selected Products' when ready.
Prerequisites
Microsoft .NET 2.0 Framework
Microsoft Web Services Enhancements 3.0
ODBC .Net Data Provider
Microsoft Data Access Components 2.8 (MDAC)
Install Prerequisites
Available Products
Select All
ADIS Manager Not Installed
ADIS Service Not Installed
AppMapper Installed
BarCoder Installed
CDViewer Not Installed
iDox Designer Installed
iDox Service Installed
iLink Not Installed
iScan Not Installed
MultiFunctionService Installed
QuickIndexer Not Installed

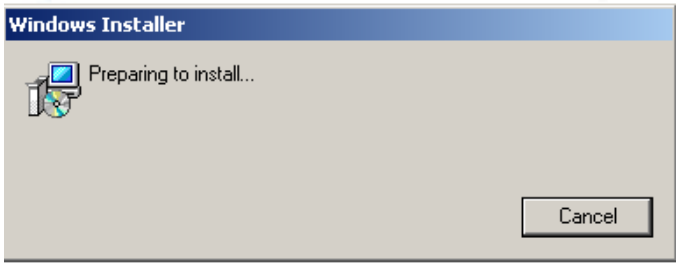
4. Select **Install Selected Products**.




5. If the license agreement is acceptable, select **I agree**.


End User License Agreement
iDatix Corporation Software License Agreement
1. LICENSE: Customer agrees to license products offered by IDATIX Corporation (IDATIX CORPORATION) as described herein.
2. SOFTWARE WARRANTY: IDATIX CORPORATION "supported software" is warrantied to conform to the IDATIX CORPORATION software product description applicable at the time of shipment, and only to the extent that the Customer notifies IDATIX CORPORATION in writing within 90 days after delivery of any material nonconformity to such specifications.
IDATIX CORPORATION's sole obligation shall be to remedy any nonconformance of the software to the software product specification. All other software is provided "as is." The express warranty
I Do Not Agree
I Agree

*Note: The Windows Installer displays.*



*Note: The Quick Indexer Installation will take a few minutes.*

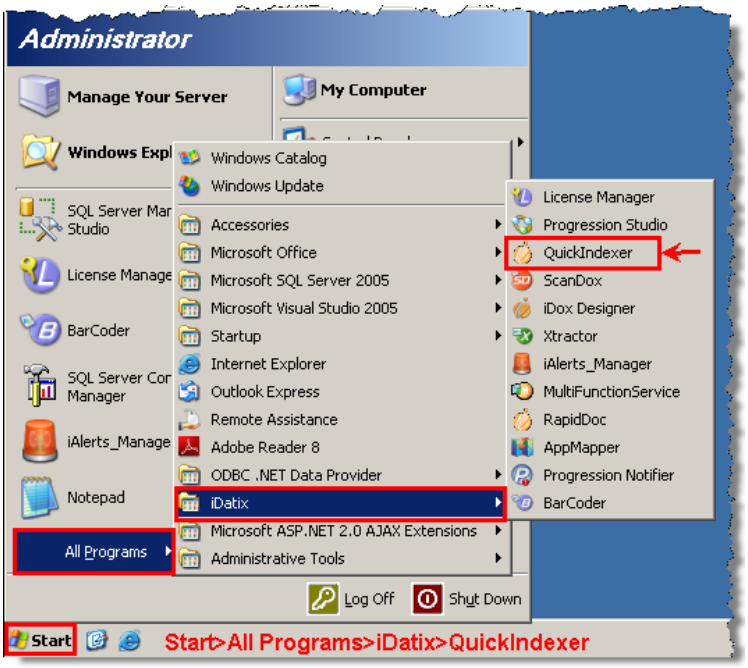
6. A short cut Quick Indexer icon is placed on the Desktop.

# Quick Indexer Login

Once Quick Indexer has been installed, you may log in to the Application.

1. Navigate to and select the **Quick Indexer icon** on your desktop.

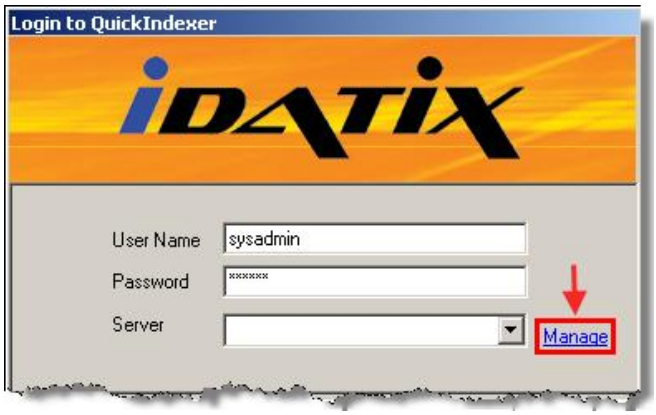
*Note: If you do not have a short cut icon on your desktop, navigate to Start>All Programs>iDatix>Quick Indexer.*



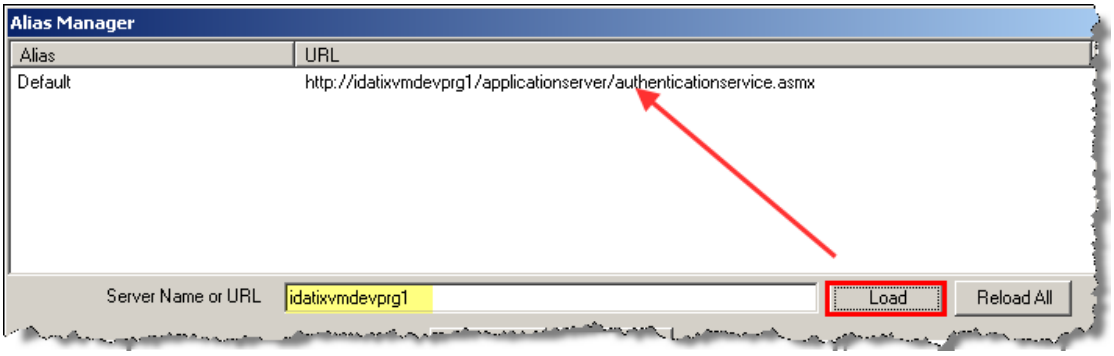

*Note: The login dialog displays.*

2. Define your **User Name**.
3. Define your **Password**.

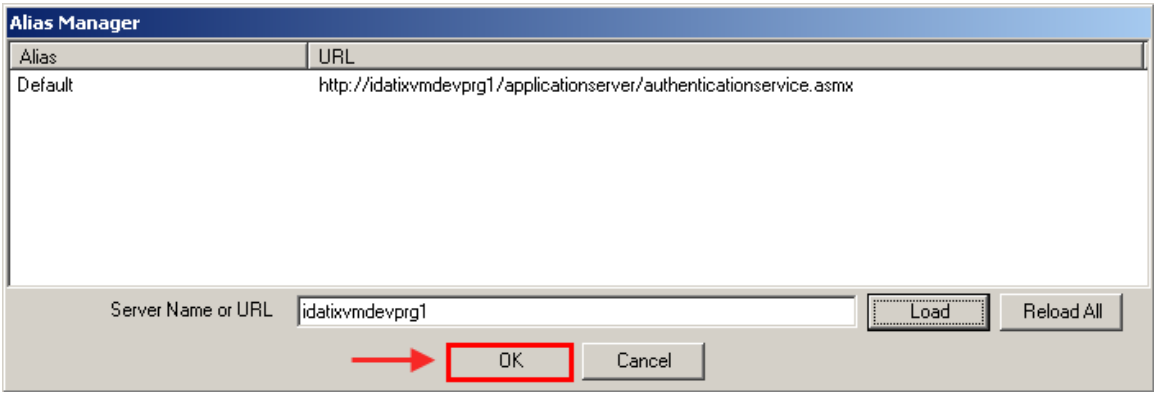
4. Select **Manage**.




5. Define the **Server**.
6. Select **Load**.




7. Select **OK**.



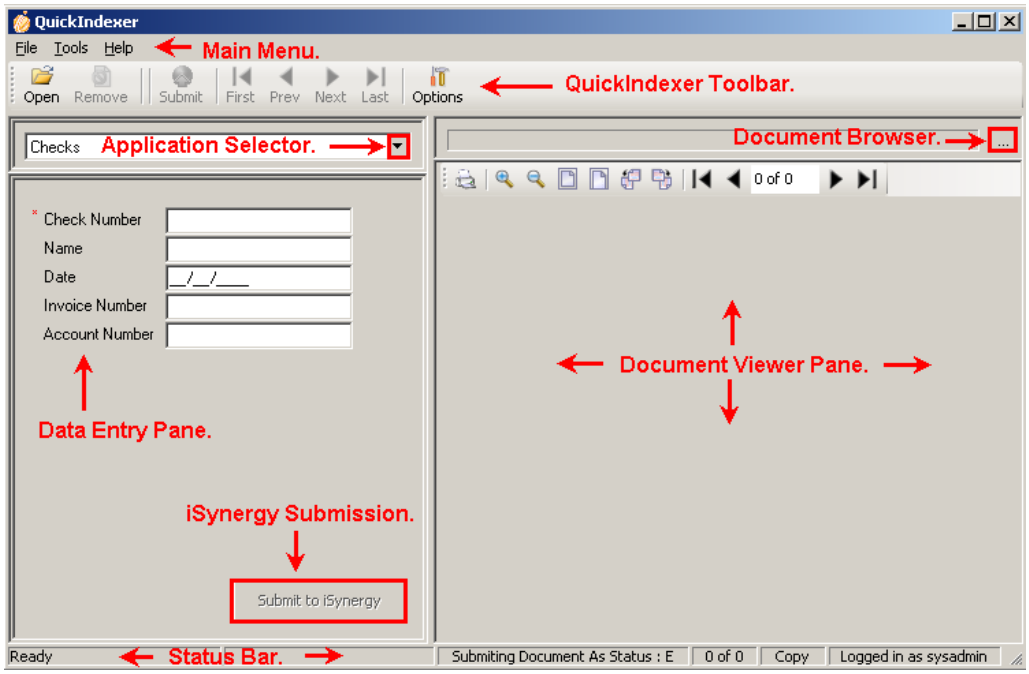
8. Select **Login**.

9. The Quick Indexer application launches.

# Quick Indexer Product Overview

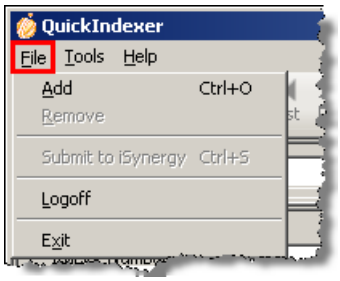
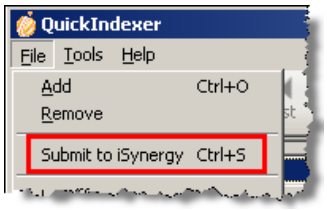
The iDatix Quick Indexer application consists of eight main areas:

- Main Menu.
- Toolbar.
- Application Selector.
- Data Entry Pane.
- iSynergy Submission.
- Document Browser.
- Document Viewer
- Status Bar.

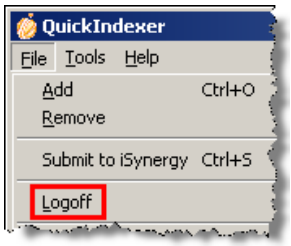



## The Main Menu

The Main Menu bar contains three available menus: File, Tools and Help.

| Element | Description |
|---|---|
| **File**<br> | The File Menu consists of five options: Add, Remove, Submit to iSynergy, Logoff and Exit.<br>  |
| **File>Add**<br> | This option allows the user to browse for image files located on the hard drive or any accessible drive.<br>*Note: Holding the Ctrl key while pressing O or pressing the Add option on the toolbar initiates the same response.* |
| **File>Remove**<br> | This option closes the current file that is loaded in the Document Viewer.<br>*Note: Clicking **Remove** on the toolbar initiates the same response.* |
| **File>Submit to iSynergy**<br>  | This option allows the user to submit an image file into the iSynergy system.<br>*Note: Holding the Ctrl key while pressing S or clicking the Submit to iSynergy button on the Data Entry Pane initiates the same response.* |

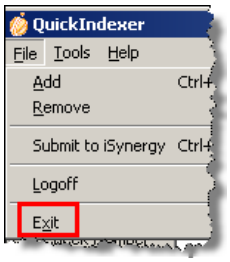
**File>Logoff**




This option allows the user to log out of the Quick Indexer application.

> *Note: If a user logs off of Quick Indexer, the next time they initiate the program (i.e., drag and drop an image onto the QuickIndexer desktop icon), they are required to log back into the application.*

**File>Exit**

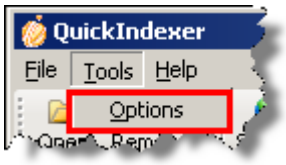



This option allows the user to close the QuickIndexer application, but retains the log in information which allows the user to drag and drop documents onto the Quick Indexer desktop icon without having to log back into the application.

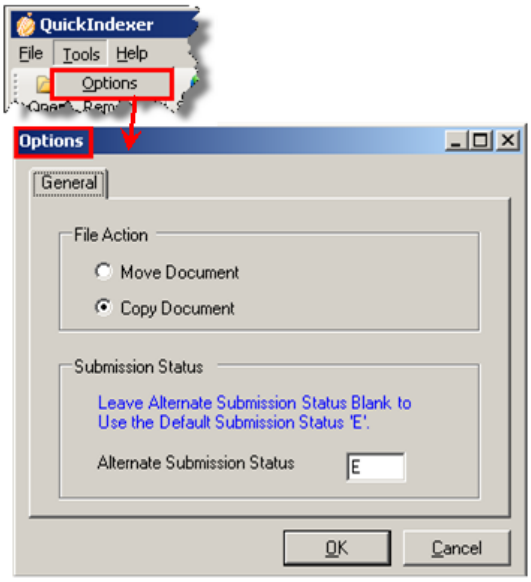
**Tools**

The Tools Menu consists of one item: Options.

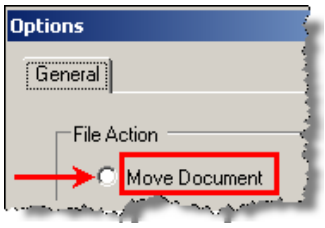
**Tools>Options**




The Options screen allows the user to configure the File Action and Submission Status when submitting electronic files.

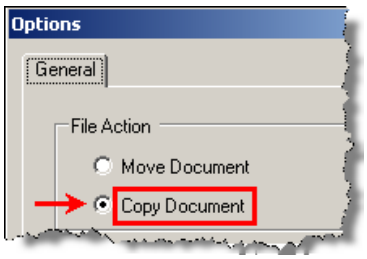



**Tools>Options>Move Document**



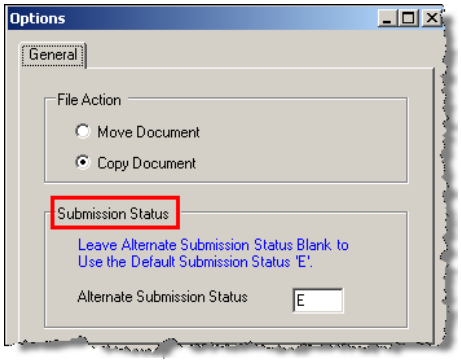

Selecting this option will relocate the submitted file from the originating directory to the repository.

**Tools>Options>Copy Document**

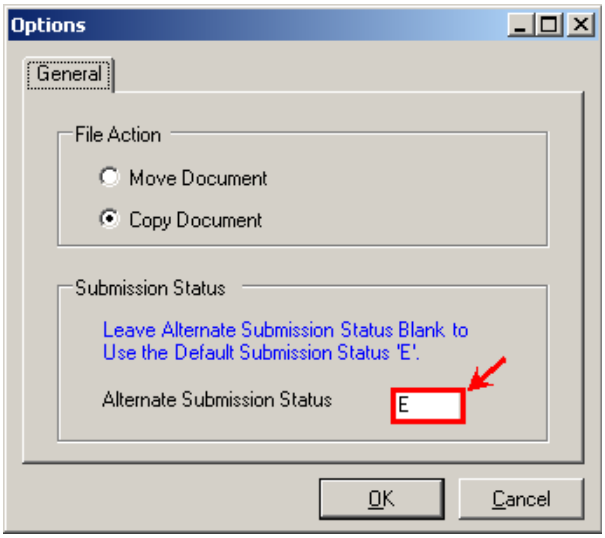



Selecting this option will copy the submitted file from the originating directory into the repository.

**Tools>Options>Submission Status**




This field allows the user to override the default submission status (usually E).




*Note: Leave this field blank to use the default E status.*

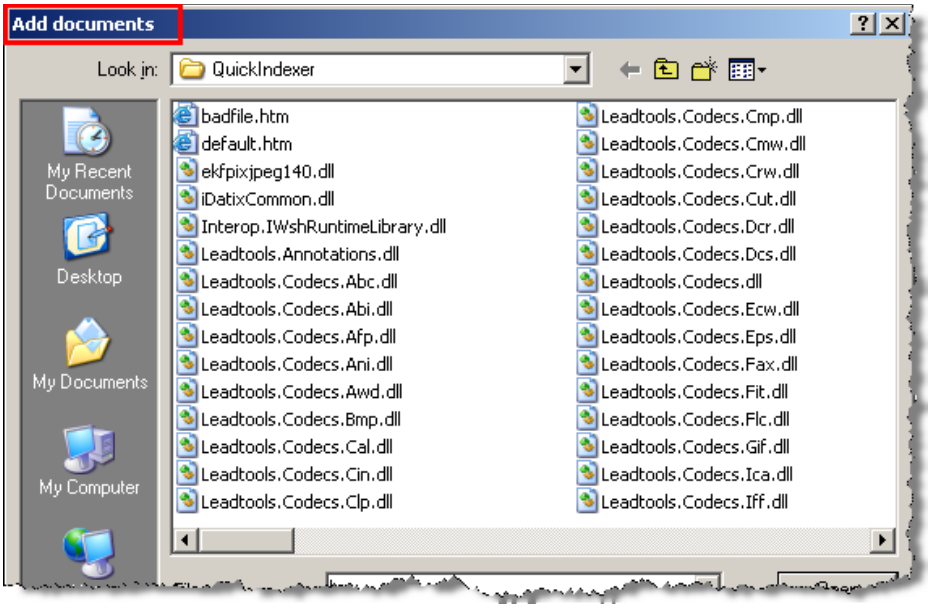
**Help**

The Help Menu consists of one option: About. The About option provides a brief description of Quick Indexer by listing the product name, company name and version number.

# The Toolbar

The Quick Indexer Toolbar allows users to quickly access controls to open a new file, close a file, submit a file into iSynergy, navigate through multiple open files and configure settings.

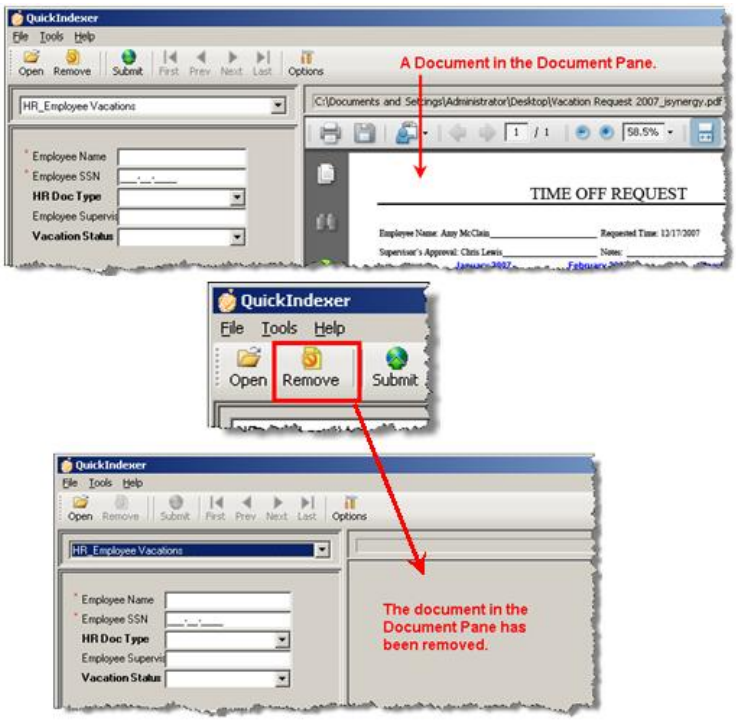
| Element | Description |
|---|---|
| **Open** | Provides the ability to browse for image files located on the hard drive or any accessible drive. |




*Note: Holding the Ctrl key while pressing O or selecting File>Add will also accomplish this goal.*

**Remove**

Provides the ability to remove the current file that is loaded in the Document Viewer.




*Note: Selecting File>Remove initiates the same response.*

**Submit**

Provides the ability to submit an image file into the iSynergy system.

*Note: Holding the Ctrl key while pressing S or selecting File>Submit to iSynergy initiates the same response*

**First**

Provides the ability to view the first file loaded into the Document Viewer when multiple documents have been loaded.

**Previous**

Provides the ability to view the previous file loaded into the Document Viewer when multiple documents have been loaded.

**Next**

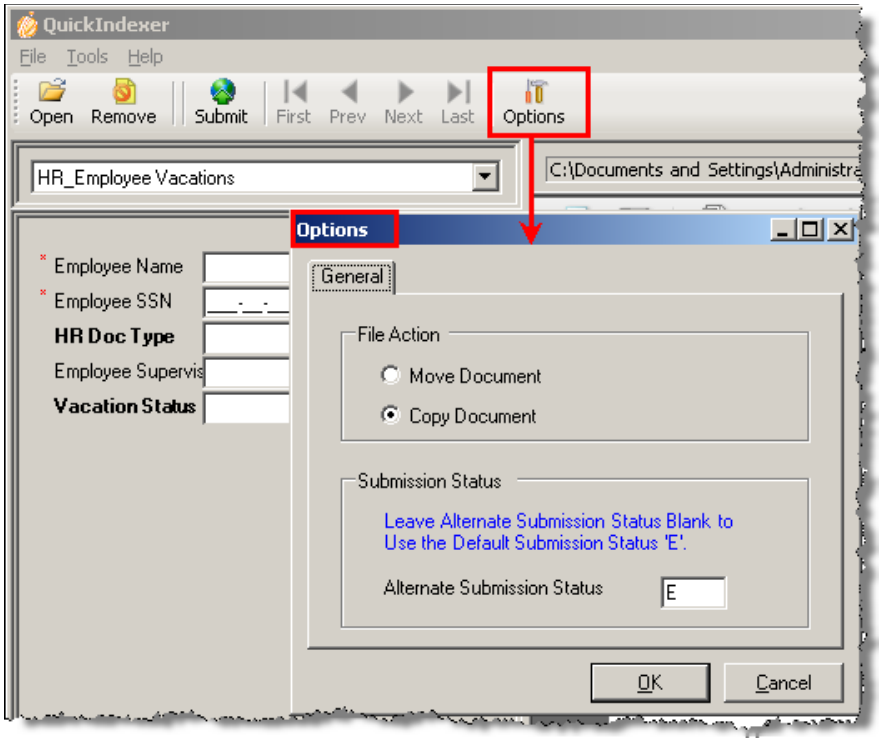
Provides the ability to view the next file loaded into the Document Viewer when multiple documents have been loaded.

**Last**

Provides the ability to view the last file loaded into the Document Viewer when multiple documents have been loaded.

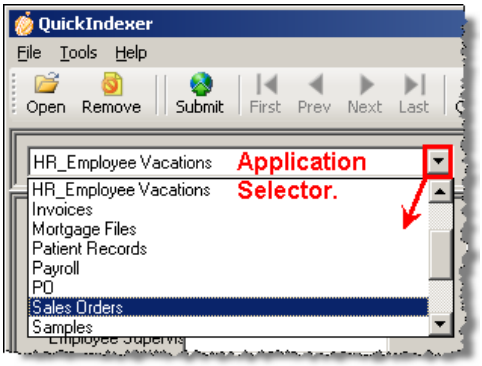
**Options**

Provides ability to view the Options dialog.




# Application Selector

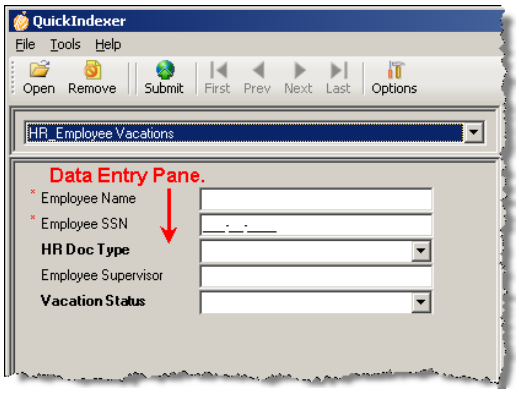
In order to place the file in the correct Application, the user must select the desired Application from the Application Selector.



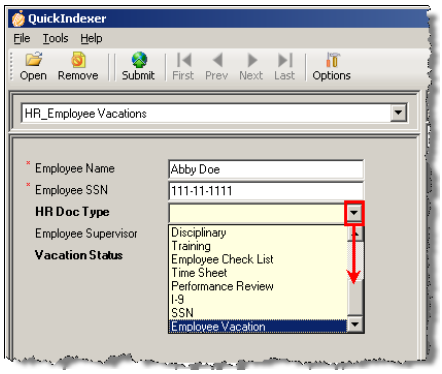

The Application Selector is a drop-down menu containing the list of applications the user has been granted access. Clicking on the down arrow extends the list and allows the user to select the appropriate application.

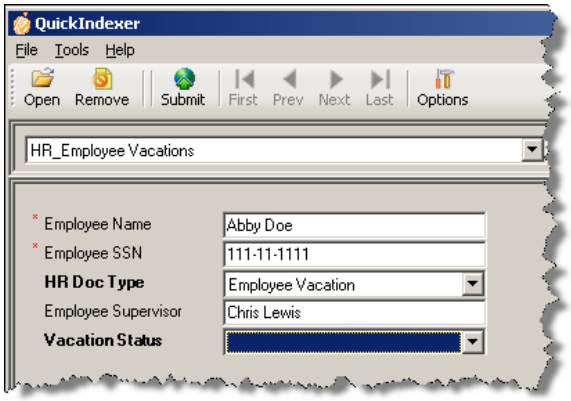
# Data Entry Pane

The Data Entry Pane contains the predefined Index values for a file. The indexes appear in the Data Entry Pane based on the application selected.



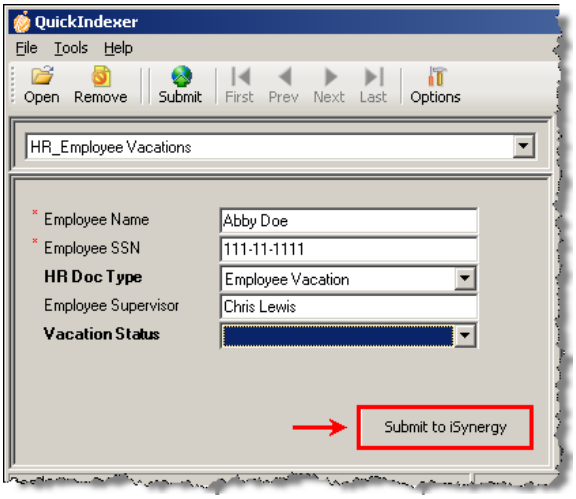

Enter the information in the textboxes and/or choose selections from available dropdown menus.



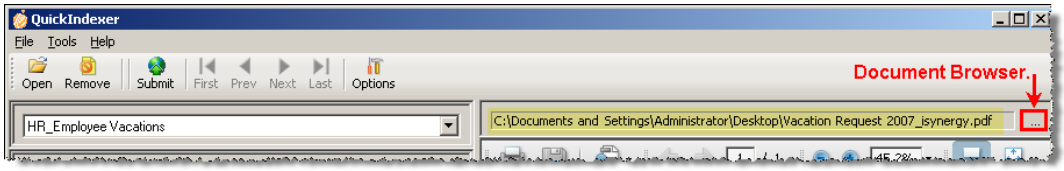
# iSynergy Submission

After selecting the appropriate application, loading the correct file and assigning the appropriate index values, the user is ready to submit the file into the iSynergy system. Select Submit to iSynergy to complete the process.

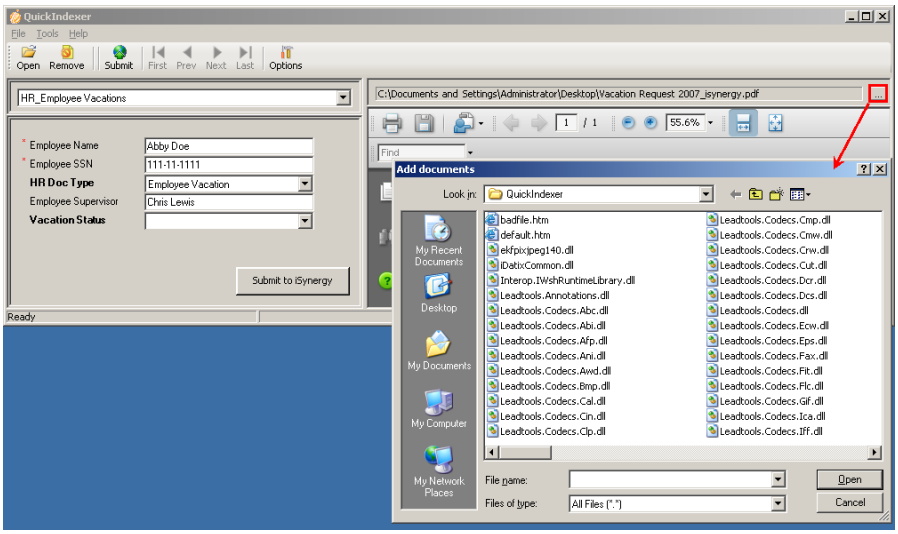



# Document Browser

The Document Browser allows the user to locate a specific file to load into iSynergy.

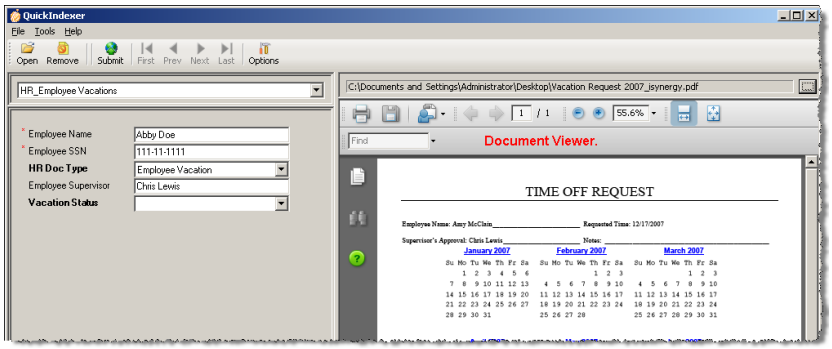



Click Browse [indicated by the ellipses (…)].This opens the browse dialog for the user to select the file.

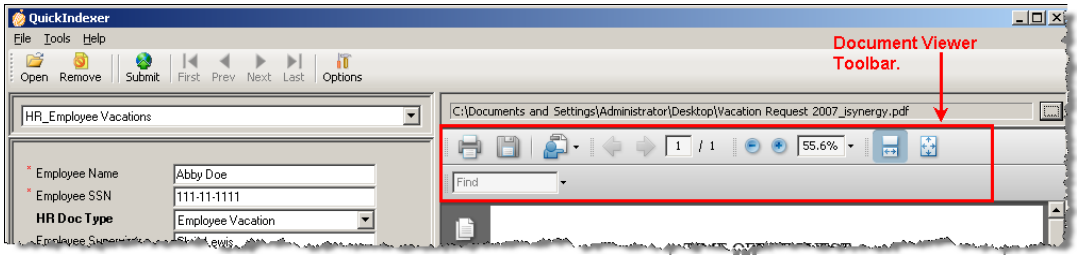


# Document Viewer

The Document Viewer allows the user to preview all of the pages in the file.

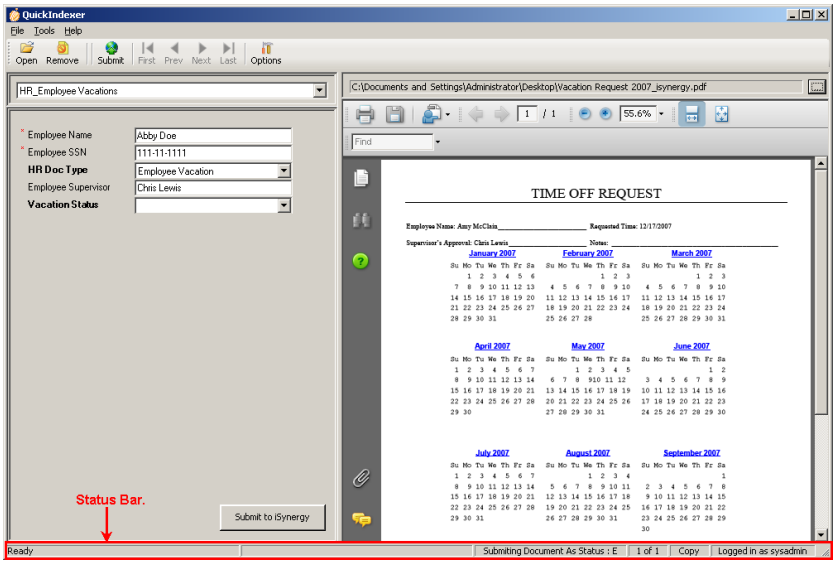



The Document View displays its own toolbar. Use this toolbar to zoom, rotate, jump to specific pages and select a viewing option.




# Status Bar

The Status Bar displays important document information, such as how many documents are currently opened, which document is active, and the current username.



# Using Quick Indexer

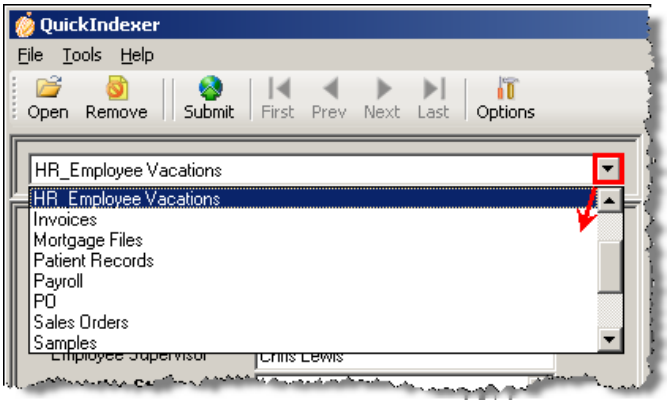
Quick Indexer can upload files to the iSynergy system in two ways.

- Loading the file using the built-in Document Browser in the Quick Indexer program.
- Drag and drop the files on the Quick Indexer desktop icon.

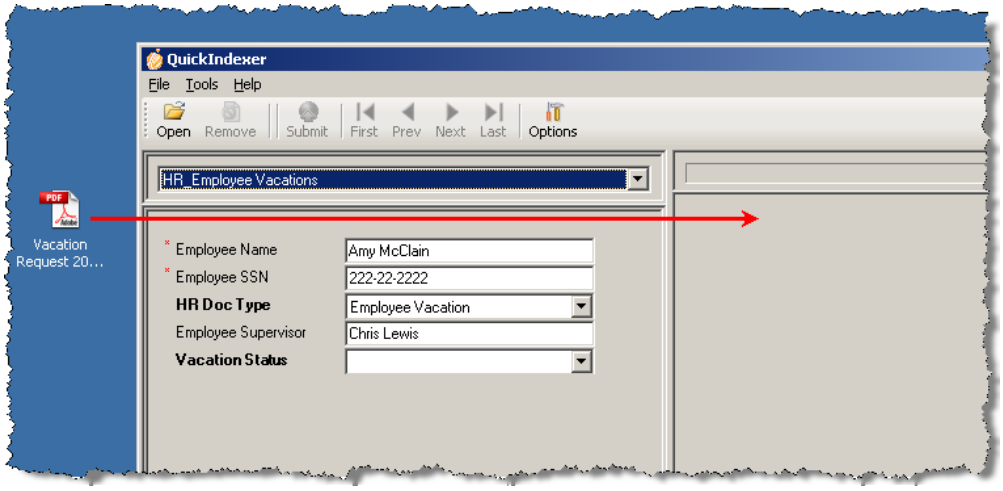
## Loading a File in Quick Indexer

1. Select on the **Quick Indexer** desktop icon.

2. Choose the **Application** the file is associated with by selecting it from the drop-down menu.

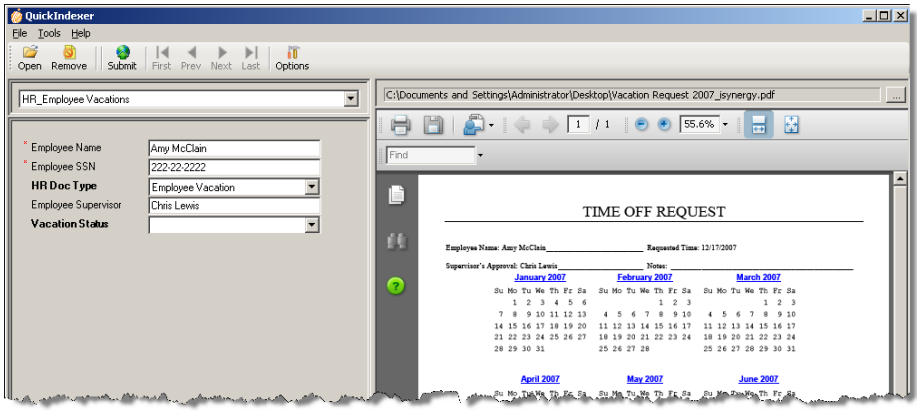



3. Browse for the document to be loaded using one of the following three options:

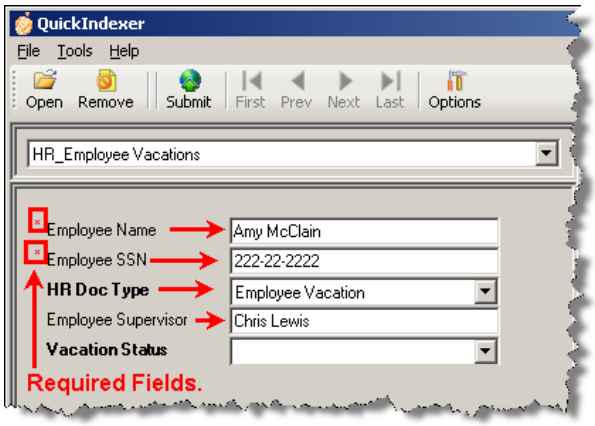



- **Select the file and drag it into the Document Pane**.
- Select File>Add option from the Main Menu.
- Click the Open button located on the toolbar.

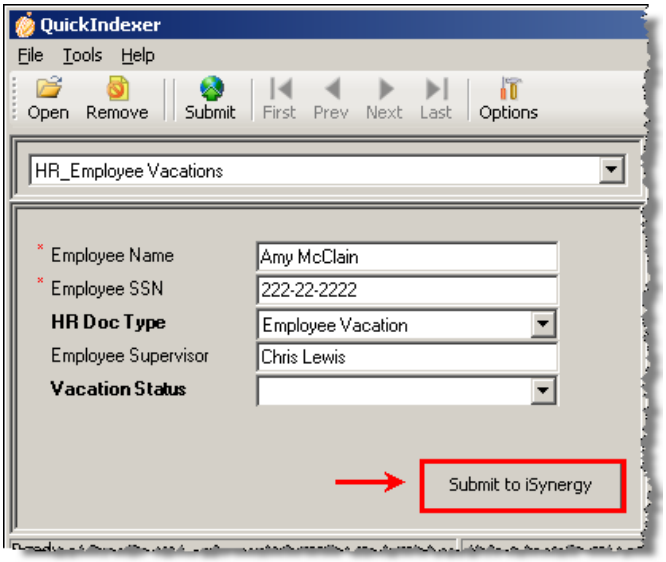
- Use the Document Browser to locate the desired file.




4. Enter the appropriate I**ndex Values**.




5. Submit the file to iSynergy using one of the following options:




- Click the **Submit to iSynergy** button in the *Data Entry Pane*.
- Click the Submit button on the Quick Indexer toolbar.
- Select File>Submit to iSynergy or press Ctrl + S.